INTRODUCTION

The nationwide rollout of PCC+ requires a considerable amount of coordination between Area offices, Sites, and ITSC staff. This document describes the rollout plan specifics required for this effort.   ITSC's goals for the PCC+ national rollout are to:

➢ provide Areas and Service Units with the information and tools necessary to determine whether sites should and/or are able to implement PCC+;
➢ assist Areas in planning for, training and providing Area-wide implementation teams and super users; and
➢ provide technical assistance for sites.

To accomplish these goals, ITSC has several short-term objectives:

➢ Orient each Area to the PCC+ application by providing a one-day Orientation session to Area and Site staff.
➢ Provide two Pre-Implementation site visits at no charge to each Area. The Area would be encouraged to select two sites that will become the expert users of the PCC+ application within their Area and act as planning and training resources to subsequent sites.
➢ Furnish sites with information, tools and training needed to successfully plan for and implement PCC+, including a step-by-step guide to implementation, equipment needs, user and technical manuals, process change recommendations, skills required, and "how-to" metrics planning.
➢ Provide standard templates for site use, and guidance for recommended data fields for those sites designing their own forms.
➢ Provide classroom-style advanced Word training for sites to edit and design forms.
➢ Provide some on-site and classroom-style training on customization of provider ICD-9 and site CPT codes.
➢ Provide help desk and technical support services for installation and on-going application support.

This document outlines specific plans for each of the following phases of the rollout process:

    A. Area Orientation
    B. Site Identification, Self-Evaluation and Selection
    C. Pre-Implementation Visit
    D. Site Preparation and Go Live
    E. Training
    F. Staff Pool and Support Staff Requirements

A. Area Orientation

The introduction of PCC+ to each Area will consist of a one-day Orientation by the ITSC Implementation Team. Because PCC+ affects the entire operation of a site, the goal for the Orientation session is for site staff representing various functions, including management, clinical, and business areas, to gain an understanding of the staffing implications, technical issues, cost considerations, and leadership requirements to implement PCC+. At the completion of Orientation, sites should have a clear understanding of how PCC+ works on a technical and organizational level.

The ITSC Orientation Team for each session will include two to three Team members with expertise in three key areas: clinical, business process and PCC+ technical knowledge (see *F. Staffing Needs*).

Sample agenda for Area Orientation

Subject	Time needed
Introduction and Objectives	.25 hr
Background on Clinical Information Management	.5 hour
PCC+ Overview and Features	1 hr
Data Quality and Standard Templates	.5 hr
Overview Business Process Re-engineering	.75 hr
Workflow break out groups	1.5 hrs
PCC+ in the Real World: Lessons Learned	.5 hr
Site Project Plan Overview and Metrics document overview	.5 hr
Wrap Up ♦ Area roll out plan ♦ Planning Document Review: Site Survey, --- Technical Requirements, etc. ♦ Q & A	1 hr

Those Areas who are planning on forming Area-wide Implementation Teams and want to provide their own training and technical assistance may also choose to hold on-site training sessions concurrently with the Orientation sessions (see E. Training).

B. Site Identification and Preparation

1. Site selection by Area Office

After the Area Orientation, the Area has the opportunity to select two sites for Pre-Implementation visits at no charge. Additional visits will be provided at a cost. The Area and the Sites should review the *Site Recommendations* document and consider budget and staffing before selecting the two sites. ITSC would encourage Areas to consider some of the following criteria to select sites:

➢ willingness to provide technical, clinical and/or business resources to assist other sites within the Area in pre-implementation planning, training, workflow redesign, and/or other implementation activities
➢ presence of multi-departmental resources willing to contribute time and resources needed
➢ lack of budget to pay for pre-implementation visit
➢ commitment by management at Site facility

ITSC will encourage the Area office to form its own Implementation Team to assist sites in determining their readiness for PCC+ implementation, selecting a team, budgeting and procuring hardware, consulting on workflow redesign, and providing training.

2. Site Preparation

When a site has been selected for a pre-implementation visit, or determines that they are ready and would like a visit, the following steps should take place (see the Project Plan Checklist for detailed activities).

➢ Site selects its Implementation team and nominates a PCC+ Project Lead.
➢ Site completes the site survey
➢ Site forwards survey to PCC+ Schedule Coordinator and indicates two alternate dates for a site visit (at least six weeks from request date).
➢ Site (or Area) orders Print Servers (recommended to be received and installed prior to pre-imp visit)
➢ ITSC Visit Lead is identified
➢ ITSC Visit Lead coordinates initial conference call with Site Implementation Team Lead.
➢ ITSC Visit Lead finalizes visit dates with Site Project Lead
➢ Site coordinates PCC+ install on RPMS server with ITSC, and installs Print Servers (prior to visit).

C. Pre-Implementation Visit

As described in the Site Identification section, ITSC will offer up to two on-site pre-implementation visits to interested sites in each Area at no charge. However, there will

be a charge for additional site visits. The additional site visits can be purchased through ITSC or directly from Full Circle Software. Pre-implementation visits are not required to implement PCC+ but are strongly recommended as they encourage staff buy in, offer on site training for data extraction and review, and provide an analysis of clinical and business workflow and associated process recommendations for the most efficient implementation of PCC+.

Two or three ITSC Team members will perform a two-day on-site visit. The purpose is to prepare the site's Implementation Team for the changes required to implement PCC+. The ITSC team will provide a brief (approximately one hour) PCC+ Overview to any staff at the site who would like to attend). In addition, ITSC Team will work with the Site Team to perform a workflow process analysis, train site "experts" on ICD-9 extract and CPT customization, and provide an encounter form documentation review. After the visit a report of findings and recommendations will be provided to the site.

Sample agenda for Pre-Implementation Visit.

Subject	ITSC Expertise required	Time needed	Intended Audience
DAY 1			
Introductions Overview of objectives Review of survey And meeting with site leadership	ITSC Team	.5 hr	Implementation Team and Site leadership
PCC+ Overview	ITSC Team	1 hr	Open session for all staff at facility
Tour of Facility	Clinical and Business Process	Depends on size	TBD
Clinical process review Review PCC+ templates, select the first clinic, and review coding and documentation requirements.	Clinical	4 hrs	Physician, Nurse, Coding, Data Entry
Workflow Interviews and Process Review (include review of metrics)	Business Process	4 hrs	All staff involved with patient and chart flow

Subject	Staff required	Time needed	Intended Audience
DAY 2			
ICD-9 extract/CPT4 customization and review of file merge.	Clinical or Business Process	2 hrs	Site Manager, Coding, Data Entry, Physician, Nurse, Billing
Continue with workflow interviews and process review	Business Process	2 - 4 hrs	All staff affected by patient flow
Discussion of findings. Review of existing as well as recommended workflow process changes	Business Process and Clinical	1 - 2 hrs	Implementation Team
Wrap up ♦ Project Plan Overview ♦ Metrics Document Review ♦ Web site information ♦ Q & A ♦ ITSC Help Desk ♦ Next Steps	ITSC Team	1 hr	Implementation Team

D. Site Preparation and Go Live

ITSC has provided tools to assist sites in implementing PCC+, whether they participate in a pre-implementation visit or not. Sites should review and customize the project plan checklist provided to ensure that all tasks and activities are completed. Tasks and activities should be added to meet a site's specific needs and requirements for implementation. After the pre-implementation visit, the main activities for the site will be:

> ➢ Hold regular meetings with Implementation Team & Users
> ➢ Select pilot clinic and template
> ➢ Identify and implement appropriate workflow changes
> ➢ Identify and reach agreement on ICD-9 and CPT4 codes for each demographic group
> ➢ Order laser printers, copiers and other equipment (if needed)

➢ Space planning and associated changes (if needed)
➢ Test form
➢ Go Live

These activities and others are described in greater detail in the Project Plan Checklist.

E. Training

1. Area Training
ITSC will provide each Area one training session on-site at no charge for both form editing/design (MS Word) and data extraction and review (Excel). This training may be offered successively with the Area Orientation session. The purpose of the Area training is to encourage Area and/or site staff to develop expertise and provide training themselves to other sites.

The Train the Trainer agenda is a one-day session, and covers the following topics.

Subject	ITSC Staff required	Time needed	Intended Audience
ICD-9 Extract/CPT4 Customization Process	Clinical / Business Process	2 - 3 hrs	Area staff assigned to Train on PCC+, Site staff
Template Design and Advanced Microsoft Word Features	Word expert	3 - 4 hrs	Area staff assigned to Train on PCC+, Site staff

2. Advanced Word Topics and Form Customization
ITSC also will offer Advanced Word Topics and Form Customization training on a periodic basis at the Albuquerque training facility. If the Area is not providing its own training, the person(s) assigned as the site's Word super user can attend the class in order to learn how to customize encounter forms, and create templates for additional clinics.

Pre-Requisite: Site must be operational for at least 30 days on one of the standard templates. Staff must bring current form, and the changes that they want to make to class. Staff must have intermediate skill in Microsoft Word.

F. ITSC Team Skill Needs

Staff with varying skill sets and background is required for the many different functions of the national roll out. The Area Orientation Visits and the Pre-Implementation Visits require Team members who are knowledgeable in one or more of the following areas: IHS clinical environment, business process and/or workflow analysis, IHS business environment, and good technical understanding of the PCC+ application.

1. Area Orientation (3 Team members)

Clinical	*Business Process*
Theresa Cullen, M.D.	Sandra Lahi
Timothy Mayhew, M.D.	Carol Miller, BSN
Carolyn Johnson, R. Ph (t)	Angela Tiberio, M.D. (t)
Greg Shorr, M.D. (t)	Carolyn Johnson, R. Ph (t)
Angela Tiberio, M.D. (t)	

(t = technically knowledgeable about PCC+.)

2. Pre-Implementation Visits

Clinical	*Business Process*
Angela Tiberio M.D. (t)	Carol Miller, BSN
Carol Miller, BSN	Helene Minot (t)
Liz Dickey, MPH, RN, FNP	Sandra Lahi
Timothy Mayhew, M.D.	Liz Dickey, MPH, RN, FNP
Carolyn Johnson, R Ph (t)	

(t = technically knowledgeable about PCC+ and able to train on data extract procedures.)

3. Support Staff
The following staff is required in addition to staff listed above to support the National roll out, ongoing support, and continued implementation of PCC+.
- PCC + Project Director: Theresa Cullen, M.D.
- PCC+ Schedule Coordinator: Linza Bethea
- Technical Support
  - End User Support: Not assigned yet
  - Technical Support: Not assigned yet

4. Advanced Word Topics and Form Customization Training
- Angela R.C. Tiberio, MD
- Helene Minot
- Tamra Baker-Ashby

5. Data Extraction/Managing User Preferences
- Angela R.C. Tiberio, MD
- Carolyn Johnson
- Helene Minot
- Sandra Lahi (to be trained)
- Adrian Lujan